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DOMESTIC TRACKING SURVEY

WAVE 2

SUMMER 1982 CAMPAIGN

CONDUCTED BY THE CANADIAN GALLUP POLL LTD.

REPORT PREPARED BY  
TOURISM MARKETING INFORMATION SERVICES

July, 1982



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Publication  
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(PT.2)

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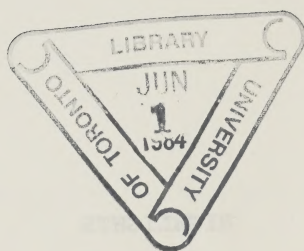
July, 1982



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### HIGHLIGHTS

- 1) All campaign awareness variables measured in Wave 2 increased significantly over Wave 1. The key awareness measures are shown below:

<u>Advertising Awareness</u>	<u>Wave 1</u>	<u>Wave 2</u>
- Top of mind	3%	11%
- Total spontaneous awareness	5	19
- Total awareness (unaided & aided)	50	75
Slogan awareness	82	87
Insert awareness	42	51

- 2) Generally speaking, agreement with the attitude statements tested was very high across all demographic and awareness groups. Those who are aware of Ontario's advertising, however, are more likely to believe that Ontario is an interesting place to spend your vacation and that information about travel in Ontario is easy to obtain.
- 3) Once again, the insert appears to be promoting the fact that Ontario represents good value for your money.
- 4) The major awareness and intention to travel profiles are shown on the next page.





# IMPORTANT PROFILES

AWARE OF ONTARIO ADVERTISING (AIDED/UNAIDED)		SLOGAN AWARENESS		INSERT AWARENESS		INTENTION TO TRAVEL IN ONTARIO JULY - SEPTEMBER, 1982	
Age	Under 50 years	Awareness decreases with increase in age group		-		Under 50 years	
Sex	Male	-		Male		-	
Education	Increases as level of education increases	High school or higher		University		High school or higher	
Income	Increases as household income increases	-		\$15,000 & over		Increases with an increase in income group	
Children in household	-	-		-		Children present	
Region	-	-		-		-	
Aware of Advertising		Aware		Aware		-	
Aware of Booklet	Aware	Aware				-	
Aware of Slogan	Aware			Aware		-	

\* The subgroups indicated above are more likely to have seen the specified components of the campaign or to be travelling in Ontario, than any other subgroups. A (-) indicates there is no differentiation amongst the demographic/awareness subgroups.



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BACKGROUND AND OBJECTIVES  
METHODOLOGY





## BACKGROUND AND OBJECTIVES

This report is the second wave of a four part research program designed to monitor the effectiveness of the Ministry's "Yours to Discover" advertising campaign.

This advertising campaign, which is run twice yearly, promotes tourism and travel in Ontario centering around the "Yours to Discover" theme. The most recent portion of the campaign was conducted beginning in May 1982. The campaign consisted of a 48 page colour newspaper insert run in Ontario daily newspapers as well as T.V., radio, newspaper and magazine advertising.

Specifically, the objectives of this tracking study are to provide measures of:

- i) awareness of advertising for vacation travel in Ontario
- ii) recall of media used in advertising for vacation travel in Ontario
- iii) awareness of the "Yours to Discover" slogan
- iv) recall of the "Yours to Discover" newspaper insert
- v) attitudes towards Ontario as a vacation destination
- vi) intention to travel in Ontario in the next three months

Research was conducted in two prior periods in which similar, but not identical questionnaires and methodology were used. Where applicable, the report may refer to these earlier results for comparison purposes.



## METHODOLOGY

In total, 410 adults in Ontario, 18 years of age and over were interviewed by telephone from Gallup's central telephone facility in Toronto. Interviewing took place in the evenings and on week-ends from June 25 to June 29, 1982. Two call-backs were made to households where there was no answer or a busy signal.

The sample was designed to produce a random sample of respondents in Ontario 18 years of age and over. Telephone numbers were obtained by adding a constant digit to numbers of respondents interviewed in a recent Gallup Ontario Omnibus study. \* This ensures a sample stratified by community size and region. Pre-determined quotas for age and sex resulted in a sample of Ontario residents balanced to Statistics Canada data for Ontario by age, sex, region and community size.

The Canadian Gallup Poll is confident that the sample is representative of Ontario residents 18 years of age and over.

In keeping with the tracking objective, the questionnaire used was identical to the previous Wave's. A copy of the questionnaire is appended.

- \* A detailed outline of the Ontario Omnibus Sample design is appended to this report. Wave 1 was conducted in January 1982.



## RESEARCH RESULTS





SOURCE FOR VACATION IDEAS

As one might expect, very little variation was found in this question from the first wave. Friends/relatives continued to be the main source of vacation ideas (42%) followed by newspapers (21%). An interesting change observed in the summer phase, however, is the new emphasis found amongst Torontonians on friends/relatives and the lessening of the importance of newspapers as a source. A similar trend is found among younger people (18-29), who reported an upsurge in vacation ideas from friends/relatives and less reliance on newspapers.



## AWARENESS OF ONTARIO ADVERTISING

### Top of Mind Awareness

Top of mind awareness (or the first mention given) is accorded great importance in the evaluation of advertising issues since it represents the product that first comes to mind.

Eleven percent of respondents gave Ontario as the first mention of vacation advertising. This is a large increase over the winter phase (3%) and is considered to be a very good showing. The only other destinations which received a comparable showing were Florida (14%) and Bahamas/Caribbean (11%).

### Total Unaided Awareness

Awareness of Ontario advertising jumps to 19% when all spontaneous mentions are taken into account. This compares with only 5% unaided mentions during the last wave. The two groups which had higher spontaneous recall were males and those with a household income of \$25,000 or more.

### Total Awareness

Three-quarters of Ontarians are aware of some vacation advertising for Ontario. This is up considerably from the winter campaign testing where 50% of Ontarians reported awareness.

An interesting finding, in light of past research, is the fact that males consistently had higher awareness levels than females in the three measures discussed above. Prior experience would have led us to expect no difference based on sex.



This is an unexplained finding and we will monitor the next two waves to determine whether it was an anomaly this summer or whether it is a stable trend.

TABLE 1  
AWARENESS OF ONTARIO ADVERTISING

	<u>Wave 1</u>	<u>Wave 2</u>
(Total respondents)	410	410
	%	%
Top of mind	3	11
Total unaided	5	19
Total awareness	50	75





### Source of Advertising

Almost three-quarters (72%) of people who are aware of Ontario's advertising reporting having seen it on television. People under 50 years old and those with a high school education or higher, mentioned this source significantly more often. The next two most frequently mentioned sources were reported by about one-third of the respondents in each case. These are newspapers (32%) and insert (32%). Those in the 30-49 year age group gave the highest number of insert mentions, while people 30 years and over reported newspaper more often than the under 30's.

On average, respondents gave 1.8 mentions of advertising sources each.



### SLOGAN AWARENESS

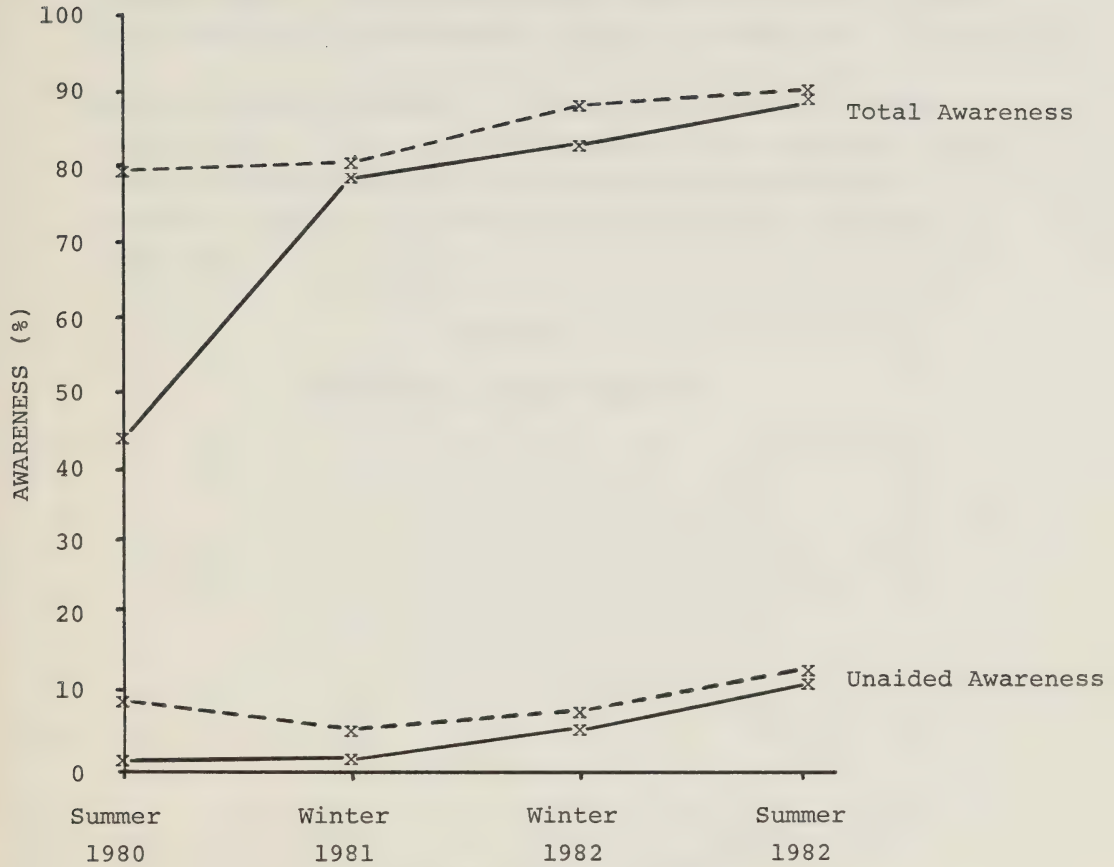
Unaided awareness of the "Yours to Discover" slogan, that is, people who mention the slogan spontaneously, increased from 4% to 9% in the second wave. A similar trend is found in the case of the "I Love New York" slogan, which doubled from 6% to 12% in the summer wave.

Those people who did not spontaneously mention either of the above slogans, were asked specifically whether they had ever heard of the slogan. Total slogan awareness thus increased from 82% in Wave 1 to 87% in the summer wave for the "Yours to Discover" theme and remained at 87% for "I Love New York". If the "Yours to Discover" slogan had reached a stabilization peak during the winter campaign, it has now been broken with the further increase in awareness. There is now virtually no difference between the extremely successful and long running "I Love New York" slogan and Ontario's "Yours to Discover". Figure 1 tracks awareness of both over the campaign's life.

The demographic characteristics of those of the "awares" (both slogans) have not changed since the first wave, which is to be expected. In this wave as well, sex has no effect on awareness, and age is negatively correlated to awareness while education is positively correlated. Although the trend towards those with household incomes of over \$15,000 having higher awareness levels is found in this wave also, the difference does not reach significance.



FIGURE 1  
ONTARIO, YOURS TO DISCOVER SLOGAN AWARENESS  
(Unaided and Total Awareness)



— Ontario, Yours to Discover  
-- I Love New York





### INSERT AWARENESS

A majority of Ontarians saw the "Yours to Discover" summer insert (51%). This is an increase over all previous insert distributions (which ranged from 42-44% awareness). (Figure 2)

As in the prior research, both the Metro Toronto region and the rest of the province reported equal awareness levels with an increased level of awareness among the higher educated. Again, the stronger male awareness persists for the insert.

FIGURE 2

### NEWSPAPER INSERT AWARENESS

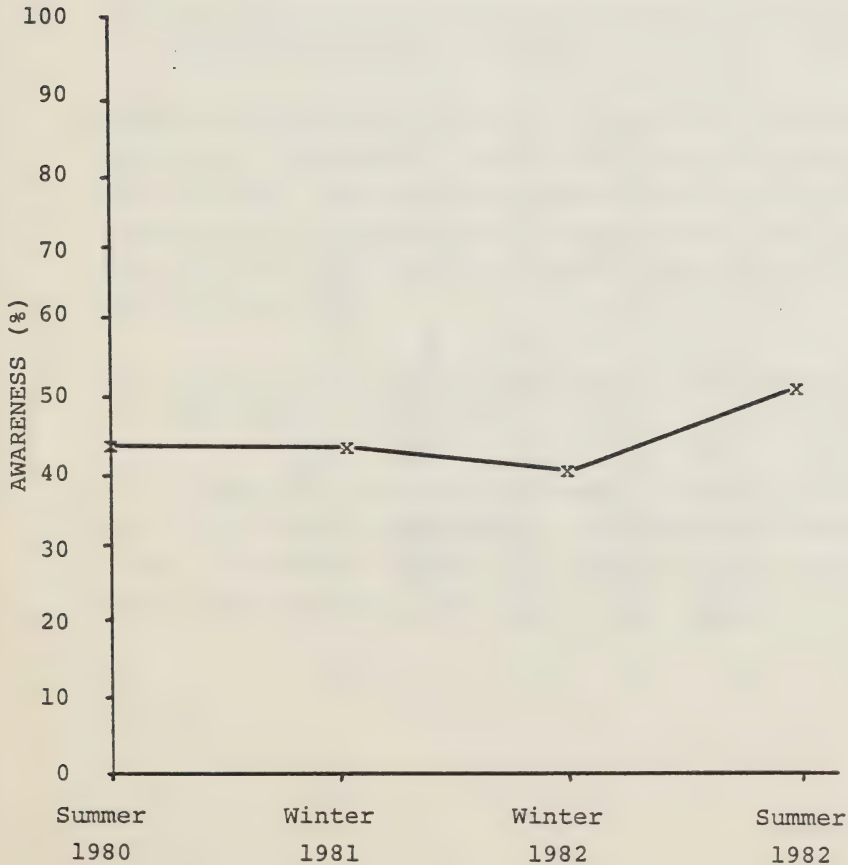


TABLE 2

AGREEMENT WITH ATTITUDE STATEMENTS

	<u>Wave 1</u> <u>%</u>	<u>Wave 2</u> <u>%</u>
a) Ontario is a fun and exciting place to spend your holidays	84	86
b) Generally speaking, information on travel in Ontario is <u>not</u> very easy to obtain	30	27
c) There's something for everyone to do in Ontario on a vacation	89	94
d) Ontario is not a very interesting place to spend a <u>holiday</u>	10	7
e) An Ontario vacation represents good value for your money	76	81

### ATTITUDE STATEMENTS

Respondents were asked to indicate whether they agree or disagree with a series of attitude statements concerning vacationing in Ontario. Table 2 tracks agreement levels over the two waves.

- (1) "THERE'S SOMETHING FOR EVERYONE TO DO IN ONTARIO ON A VACATION". (94% agree)

Agreement with this statement is almost unanimous with 94% of Ontarians agreeing. This represents an increase over the winter test phase in which 89% agreed. The extremely high level of agreement with this statement is across the board with demographic differences or level of awareness having no effect on agreement.

- (2) "ONTARIO IS NOT A VERY INTERESTING PLACE TO SPEND YOUR VACATIONS". (7% agree)

Disagreement with this statement was almost unanimous (93%). Although all demographic groups disagreed with the statement to a very large extent, females and those living outside Toronto tended to disagree slightly more often. People who had seen Ontario's advertising were also more likely to disagree.

- (3) "ONTARIO IS A FUN AND EXCITING PLACE TO SPEND YOUR HOLIDAYS". (86% agree)

Again, agreement with this statement is very high and is equally held by all demographic subgroups and awareness groups. Agreement is about the same as in the previous (winter) test period (84%).



- (4) "AN ONTARIO VACATION REPRESENTS GOOD VALUE FOR YOUR MONEY". (81% agree)

Agreement increased from 76 to 81 percent after the summer advertising campaign. The only demographic variable influencing attitude appears to be region; with those residents outside Toronto tending to agreement more frequently (84%) than do Metro Toronto residents (75%). As was the case in the winter campaign, people who are aware of the insert are more likely to feel Ontario represents a good value. Although, the summer insert differs from the winter one in that it does not contain a package section, it appears that something in the summer insert, be it format or actual content, conveys the idea of good value.

Awareness of the slogan also results in a greater degree of agreement with this statement. This may reflect the high correlation between the insert and slogan, i.e. 93% of those who are aware of the insert are also aware of the "Yours to Discover" slogan.

- (5) "GENERALLY SPEAKING, INFORMATION ON TRAVEL IN ONTARIO IS NOT VERY EASY TO OBTAIN". (27% agree)

Residents across the province agree that information about travel in Ontario is not difficult to obtain. As level of education increases, more people tend to agree that information access is easy. Perhaps related to education, we find also that as household income increases so does disagreement with the original statement.

More people who are aware of Ontario's advertising, reported that information access is easy, compared with those who are not aware of the Ontario campaign.



INTENTION TO TRAVEL IN ONTARIO

Intention to travel in Ontario and stay overnight in commercial accommodation has almost doubled since the February testing (from 25% to 43%). An increase in travel in the province is to be expected simply by virtue of the different time frames. The prior period encompassed the spring months (March to May) while the latter testing period covers the busier summer months (July to September).

The demographic profile of the Ontario traveller does not significantly change during the two seasons studied. As the earlier research showed, the Ontario traveller tends to be under 50 years old, either male or female, with a high school education or higher. Likelihood to travel in the province increases with an increase in household income. Households with children in them are most likely to travel in the province, while couples with no children are least likely. Single adults with no children, fall in between these two groups.

No significant difference was found in intention to travel among those who are aware of Ontario's advertising and those who are not.





APPENDIX A  
SAMPLE DESIGN



## APPENDIX A

### THE DESIGN OF THE SAMPLE

The Gallup Ontario Omnibus maintains a modified probability sample in all centres over 1,000 in population. A quota sample is used in rural farm and rural non-farm centres. An independent sample of individuals is selected for each survey.

The sampling procedure is designed to produce an approximation of the adult civilian population, 18 years and older, living in Ontario except for those persons in institutions such as prisons or hospitals, or those residing in far Northern regions. Survey data can be applied to this population for the purpose of projecting percentages into numbers of people.

The sample design incorporates stratification by six community size groups, based on the 1976 Census data: cities of 500,000 population and over, those between 100,000 and 500,000, 30,000 to 100,000, 10,000 to 30,000, 1,000 to 10,000 and rural farm and rural non-farm areas.

The population is arrayed in geographic order by community size and within those classifications, by census enumeration areas. Enumeration areas, on the average, contain about 500 to 600 people.

A total of 105 enumeration areas are selected randomly from this array. Within urban centres, a random block sampling procedure is used to select starting points for interviewers. The interviewer is provided with a map of the enumeration area, showing the location of the starting point and is required to follow a specified route in the selection of households. Within the household, the youngest male, 18 years and over, at home at the time of the interview is questioned. If there is no male available, or when the male quota is completed, the youngest available female, 18 years and over is interviewed.

The selection of rural farm and rural non-farm interviewing locations follows the sample design established for urban centres in terms of geographic dispersion and random selection of enumeration areas. Because of the low population density and wide dispersion of households, the random block sampling procedure is replaced by quota sampling based on sex and age.

The design of the Gallup Poll sample has been based on population statistics of the Census of Canada, 1976.



APPENDIX B  
QUESTIONNAIRE



VACATION STUDY- WAVE II

Good...I'm.....from the Gallup Poll. We are conducting a study and we'd like to include your opinions in our survey.

1) INTERVIEWER: ASK TO SPEAK WITH:

- youngest male 18 years of age or over, living at home -  
IF NOT AT HOME ASK:
- youngest female 18 years of age or over, living at home -  
IF NOT AT HOME ASK:
- second youngest male, 18 and over, living at home -  
IF NOT AT HOME ASK:
- etc. 3rd, 4th youngest in this manner.

INTERVIEWER: REINTRODUCE YOURSELF IF NECESSARY

1. Generally speaking, where do you, yourself usually get ideas on where to go for a vacation or a weekend trip? DO NOT READ LIST.

MAGAZINES-----1 14-  
NEWSPAPERS-----2 18-  
BOOKLET/SUPPLEMENT IN NEWSPAPER-----3 16-  
TRAVEL BROCHURES-----4 17-  
  
T.V.-----5 18-  
RADIO-----6 17-  
  
TRAVEL AGENT-----7 20-  
FROM FRIENDS/RELATIVES-----8 21-  
  
OTHER-----9 22-  
  
I ALWAYS GO TO VISIT FRIENDS/RELATIVES-----1 23-  
DON'T KNOW-----2 24-

- 2 For which destinations or places, if any, have you seen or heard advertising related to travel or vacations in the past three months? RECORD 1ST MENTION IN "1ST" COLUMN AND ALL OTHER MENTIONS IN "OTHER" COLUMN. PROBE: What others?

		1ST MENTION	OTHER MENTIONS
CANADA	ATLANTIC PROVINCES-----	1 25-	1 27-
	QUEBEC-----	2	2
	ONTARIO-----	3	3
	MANITOBA-----	4	4 30-
	SASKATCHEWAN-----	5	5
	ALBERTA-----	6	6
	B.C.-----	7	7 31-
	OTHER CANADA (SPECIFY)-----	8	8
* CANADA	9	9	
U.S.A.	FLORIDA-----	1 26-	1 36-
	MICHIGAN-----	2	2
	NEW YORK-----	3	3
	OTHER U.S.A. (SPECIFY)-----	4	4 37-
OTHER	BAHAMAS/CARRIBEAN-----	5	5
	EUROPE-----	6	6
	OTHER (SPECIFY)-----	7	7 38-
	NONE/NO OTHERS-----	8	8 39-

\* IF "CANADA" ASK:  
Was this advertising for Canada itself, or for a specific place within Canada?

CANADA-----1  
PLACE WITHIN CANADA-----2

IF "PLACE WITHIN CANADA", ASK:  
Which place would that be?

RECODE ANSWER IN Q.2





IF "ONTARIO" MENTIONED, SKIP TO Q.4

IF "ONTARIO" NOT MENTIONED, ASK:

3. In the past three months, have you yourself seen or heard any advertising for vacation travel in the Province of Ontario?

YES-----1 - GO TO Q.4 <sup>45-</sup>

NO-----2

DON'T KNOW-----3 - SKIP TO Q.5.

IF SAW/HEARD ADS FOR ONTARIO, ASK:

4. Where did you see or hear the advertising for Ontario vacations? PROBE: Anywhere else DO NOT READ LIST.

\* BROCHURES -----1 <sup>46-</sup>  
 \*\* MAGAZINES -----2 <sup>47-</sup>  
 \*\*\* NEWSPAPERS -----3 <sup>48-</sup>

BOOKLET/SUPPLEMENT IN NEWSPAPER-----4 <sup>49-</sup>  
 RADIO-----5 <sup>50-</sup>  
 T.V.-----6 <sup>51-</sup>  
 BILLBOARDS-----7 <sup>52-</sup>  
 TRAVEL AGENCIES-----8 <sup>53-</sup>  
 ONTARIO TRAVEL CENTRE-----9 <sup>54-</sup>  
 OTHER (SPECIFY) \_\_\_\_\_ 0 <sup>55-</sup>  
 DON'T REMEMBER-----1

\* IF "BROCHURES" ASK:

You mentioned brochures. Where did you see the brochures?

IN NEWSPAPER-----1 <sup>56-</sup>

OTHER-----2

\*\* IF "MAGAZINES" ASK:

You mentioned magazines. Was this an ad in a magazine or was it a magazine in the newspaper?

AD (OR ARTICLE)-----1 <sup>57-</sup>

MAG. IN NEWSPAPER-----2

\*\*\* IF "NEWSPAPERS" ASK:

You mentioned newspapers. Was this an ad in the newspaper itself or was it a booklet in the newspaper?

AD (OR ARTICLE)-----1 <sup>58-</sup>

BOOKLET-----2



ASK EVERYONE:

- 5a. In advertising, slogans or catchy phrases are often used. For example, "It's better in the Bahamas" is a slogan used in the travel industry. What other slogans or phrases related to travel and vacations have you seen or heard? PROBE: Are there any other travel slogans you can recall? DO NOT READ LIST.

	Q.5a	Q.5b.	
		YES	NO
* Ontario - Yours to Discover----	1	2	3 59-
* I Love New York-----	1	2	3 60-
* So much to go for-----	1	2	3 61-
FRIENDLY MANITOBA -----	1 62-		
STAMP AROUND ALBERTA-----	1 63-		
SUPER NATURAL-----	1 64-		
OTHER(SPECIFY)-----	1 65-		
_____			
_____			
_____			
NONE-----	1 66-		

FOR EACH \* SLOGAN NOT MENTIONED. ASK:

- b. Have you seen or heard the slogan \_\_\_\_\_? READ LIST. ROTATE ORDER STARTING WITH "✓".

ASK EVERYONE:

6. As you may or may not be aware, this May, weekend newspapers in Ontario carried an insert booklet titled "Ontario - Yours to Discover." This forty-seven page booklet outlined places to visit and things to do in Ontario this summer. Do you recall seeing this booklet, or not?

YES-----1 67-  
NO-----2  
DON'T KNOW-----3

7. Now I'd like to know whether you agree or disagree with the following statements. First of all, - (READ STATEMENT) ROTATE STARTING WITH "✓". Do you agree or disagree with this statement?

	AGREE		DISAGREE	
a) Ontario is a fun and exciting place to spend your holidays-----	1	2	68-	
✓b) Generally speaking, information on travel in Ontario is <u>not</u> very easy to obtain----	1	2	69-	
c) There's something for everyone to do in Ontario on a vacation-----	1	2	70-	
d) Ontario is <u>not</u> a very interesting place to spend a holiday-----	1	2	71-	
e) An Ontario vacation represents good value for your money-----	1	2	72-	

8. Thinking of the next 3 months, do you think you will take any pleasure trips in Ontario where you will stay overnight in commercial accommodations?

YES-----1 73-  
NO-----2  
DON'T KNOW-----3



BASIC DATA

Now I'd like to ask you some additional questions so that we can classify our data.

1. Which of the following age categories are you in? READ LIST.

18-29 years-----1      74-  
30-49 years-----2  
50 years & over-----3

2. RECORD IF:

MALE-----1      75-  
FEMALE-----2

3. What is the last level of education you have completed? DO NOT READ LIST.

SOME PUBLIC SCHOOL-----1      76-  
COMPLETED PUBLIC SCHOOL-----2  
SOME SECONDARY SCHOOL-----3  
COMPLETED SECONDARY SCHOOL-----4  
  
SOME COMMUNITY COLLEGE-----5  
COMPLETED COMMUNITY COLLEGE-----6  
SOME UNIVERSITY-----7  
COMPLETED UNIVERSITY-----8  
OTHER (SPECIFY)-----9

4. What is your marital status? Are you single, married, divorced, separated or widowed?

SINGLE-----1      77-  
MARRIED-----2  
DIVORCED/SEPARATED/WIDOWED-----3

5. Are there any children under 14 years of age living in your household?

YES-----1      78-  
NO-----2

6. Finally, what was your total household income from all sources for 1981 before tax deductions? Would it be over or under \$25,000?

Under \$25,000----- ( )      Over \$25,000----- ( )      79-  
Is that-----?  
Under \$15,000-----1      \$25,000 - \$40,000-----3  
or \$15,000 - \$25,000---2      or \$40,000 and over-----4  
  
REFUSED-----5  
DON'T KNOW-----6

LENGTH OF INTERVIEW: \_\_\_\_\_ 80-

NAME OF RESPONDENT: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_

DATE OF INTERVIEW: \_\_\_\_\_ TELEPHONE: \_\_\_\_\_

I HEREBY ATTEST THAT THIS IS A TRUE AND HONEST INTERVIEW

\_\_\_\_\_  
(INTERVIEWER'S SIGNATURE)

LIBRARY DATA

How do you rate the following information as being of value to you?

1. Very valuable

2. Of some value

3. Not of value

4. Not of value

5. Not of value

6. Not of value

7. Not of value

8. Not of value

9. Not of value

10. Not of value

11. Not of value

12. Not of value

13. Not of value

14. Not of value

15. Not of value

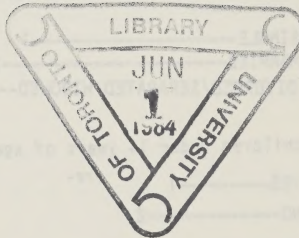
16. Not of value

17. Not of value

18. Not of value

19. Not of value

20. Not of value



21. Not of value

22. Not of value

23. Not of value

24. Not of value

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41. Not of value

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43. Not of value

44. Not of value

45. Not of value

46. Not of value

47. Not of value

48. Not of value

49. Not of value

50. Not of value





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